

**Market Analysis & Site Evaluations
California Indian Heritage Center**

Submitted to:

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September 16, 2004

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Section I
Project Background & Concept Summary

Project Background & Concept Summary

The California Indian Cultural Center and Museum Task Force in collaboration with the Department of Parks and Recreation (DPR) is responsible for the development and operation of a California Indian Heritage Center (CIHC) dedicated to the preservation, restoration, and interpretation of tribal tradition, history, and culture.

Pursuant to the provisions of SB 2063, the Task Force is required to make recommendations to the State regarding the development of the CIHC, including its location, design, content, and governance structure.¹

Scope and Objectives of Consulting Services

To assist the Task Force and DPR we have structured a work program to be carried out in two phases. Phase I, Market Analysis and Site Evaluation, is designed to assess the relative strengths and weaknesses of the proposed site candidates. Phase II addresses the estimated costs, and revenues that attach to the development and operation of a CIHC at alternative finalist sites, from start-up to stabilized operations.

Our work program provides a structured approach to the evaluation of prospective sites, within the context of their market area settings. It specifies a range of comparative elements to be objectively applied in the assessment of specific site attributes in order to determine the potentials of each site to support the CIHC project concept.

The recommendations resulting from our site evaluations and market area assessments will position the Task Force to focus on the key factors necessary to assure the selection of a site that will offer the best potentials for a successful project.

The findings and recommendations resulting from our cost and revenue estimates will position the Task Force in determining upon alternative project development schedules and in providing justification for funding approaches.

Project Concept

The CIHC is intended to foster preservation, and promote restoration, of California Indian culture. It is envisioned that the CIHC will serve as a gathering place where Indian and non-Indian peoples may study and enjoy facets of native language, literature, arts, crafts, and life way traditions.

The overall concept identifies the need for a central exhibit facility with adjacent space for performances, lectures, and workshops, day camps, and other structured activities. Additional open laboratory and holding space is intended for the maintenance and preservation of significant collections including loan exhibits from throughout the State. An important component of the concept is the provision for outdoor spaces to enable a more intimate connection with the land. These spaces may be used for traditional

¹ Senate Bill 2063, Brulte. California Indian Cultural Center and Museum. 2002

ceremonial events that may be made available for exclusive use, as well as for more public view and participation where appropriate. The outdoor element will also include various regional representations of native villages, botanical garden areas, and if adjacent to waterways, a variety of other hunting and fishing technology demonstrations.

The concept emphasizes an active and participative experience of culture, beyond the passive display of artifacts.

The site should provide the opportunity for convenient interior access to the various distinctly themed indoor and outdoor venues, providing adequate buffering and separation to achieve a sense of “unique place” at each activity center. The ability to replicate and interpret a wide variety of California Native cultural settings would be a key factor in the selection of an appropriate site.

Facilities and Grounds

The central facilities are expected to include approximately 60,000 square feet of space dedicated to the following uses;²

- ❑ Main exhibit hall including; lobby, studios, galleries and commercial areas
- ❑ Multipurpose area including, theater, exhibit preparation, demonstration, and lecture halls, classrooms, laboratories and workshop areas
- ❑ Material and artifact collection and storage areas
- ❑ Administrative support offices
- ❑ Commercial areas such as restaurants, gift shops, artisan work and sales areas.

Outdoor spaces providing the following uses;

- ❑ Native plant gardens
- ❑ Playing fields and public event areas
- ❑ Traditional meeting areas to accommodate campfire and ceremonial events for designated groups as well as special interest and general public
- ❑ Indigenous village replicas with interpretive centers
- ❑ Overnight RV and or informal camping areas with appropriate support facilities such as toilets and showers
- ❑ Other day use parking sufficient to support expected visitor volume.

The total land absorption contemplated for the fully developed operation is expected to be up to 100 acres in order to provide ample separation between the indoor, parking, access roads, and the various outdoor exhibit and activity areas.

Candidate Sites

The DPR in conjunction with a Task Force Site Selection Committee has received several

² “State Indian Museum Feasibility Study, Central Museum Building Architectural Needs”, California Department of Parks and Recreation, October 1992.

nominations from throughout the state for the location of the CIHC. Following a preliminary screening, the Committee has identified five potential sites, located in the greater Sacramento Metropolitan area.

Three of the sites are located along the Lower American River Parkway, adjacent to downtown Sacramento, in the area extending from approximately the Cal Expo site, to Discovery Park. A site located within the Folsom Lake SRA, adjacent to Lake Natoma, near the City of Folsom has long be considered as a possible location and was nominated by the City of Folsom and DPR for consideration. A site located adjacent to the Stone Lakes National Wildlife Refuge, on the southern fringe of Sacramento was also evaluated. Finally, a site located within the Santa Clara County Regional Park system, in the Mount Hamilton area, southeast of San Jose was partially evaluated, but later withdrawn from nomination by the County Parks and Recreation Department.

Section II
Sacramento Area Visitor Patterns & Estimated Heritage Center Visits

Sacramento Area Visitor Patterns & Estimated Heritage Center Visits

In the year 2002, the number of visitors to Sacramento County was estimated to be about 15 million persons. A visitor is defined as a person whose trip origin is more than 100 miles from the visitor destination. Total direct visitor expenditures by these persons are estimated to have been about \$ 1.96 billion, including air transportation and travel services.³ About 64 percent of visitors to the County were leisure travelers. Sacramento accounted for about 5 percent of all domestic and international travel to and through California and represented about 3 percent of all travel expenditures in the State.

Visitor Trends

The table below provides a comparison of visitor volume trends in Sacramento with statewide experience during the period 1998 through 2002.

Table 1
Analysis of Visitor Volume Trends
1998 Through 2002
Millions

<u>Year</u>	<u>California</u>	<u>Sacramento</u>		
	<u>Total</u>	<u>Total</u>	<u>Leisure</u>	<u>Business</u>
1998	240.9	11.7	6.9	4.8
1999	266.4	12.0	7.9	4.1
2000	287.3	14.2	9.0	5.2
2001	307.7	15.1	9.6	5.5
2002	309.4	15.4	9.8	5.6
Annual Growth %	6.4%	7.1%	9.2%	3.9%
Sacramento % Visitor Mix, 2000		100.0%	63.6%	36.4%

Source: Market Value Planners, California Department of Tourism,
D.K. Shiflett & Associates

The compound annual growth in visitor volume during the period was 6.4 % for visitors statewide and 7.1% for Sacramento County. Business visitor volume in Sacramento has grown at an annual rate of 3.9%, while the leisure segment has grown at a 9.2% annual rate.

³ Dean Runyan Associates & Sacramento Convention Visitor Bureau. The tourism industries are made up of several different industries, primarily hotels and other lodging establishments, eating and drinking places, amusement parks and recreational concerns; ground, and air passenger transportation providers, and various retail trade establishments. Measures of tourism activity often need to be inferred from data sources such as transient occupancy tax collections, airport arrivals, sales tax collections, payroll taxes levied from industry participants and a variety of survey research sources. Tourism Industries are difficult to track and measure with precision. There is no single authority responsible for measuring units of output or the volume of products or services delivered.

The period 2001 through 2002 was one of general economic downturn, shocked further by the events of September 11th, yet California visitor trips showed a modest increase of 0.6% overall, while visitor volume in Sacramento County increased by nearly 2%, during this period. The Travel Industry Association of America reports that during this period non-resident leisure travel to and through California declined by approximately 7% while resident leisure travel within the state increased by slightly more than 8%, as travelers opted for closer to home, shorter trips by automobile.

The Sacramento area appears to have captured more than its proportionate share of visitor volume resulting from this shift toward closer to home shorter trips by resident travelers. It is now ranked as the fifth largest visitor destination within the state.⁴

Travel Expenditures

In 2002, travel expenditures per visitor, on a statewide basis, averaged \$240.79 per visitor, while Sacramento visitors spent an average of \$ 127.01 per visit. Table 2 below provides a summary of the overall expenditures, per visitor, recorded in the period for Sacramento County in comparison to the statewide experience.

Adjusted for average length of stay, the Sacramento visitor spent an average of \$ 66.85 per day in comparison to a statewide average of \$ 93.69 per day, or about 29 percent per day less.

Table 2
Visitor Spending by Type of Accommodation
Annual Spending 2002
(Billions \$)

Type of Accommodation	Sacramento		California	
Hotel, Motel, B&B	\$	0.790 42.1%	\$	32.7 50.6%
Campgrounds	\$	0.027 1.4%	\$	3.0 4.6%
Private Home	\$	0.461 24.6%	\$	8.6 13.3%
Vacation Home	\$	0.018 1.0%	\$	3.1 4.8%
One Day Visitors	\$	0.581 31.0%	\$	17.2 26.6%
Sub-Total	\$	1.877 100.0%	\$	64.6 100.0%
Air Transp. & Travel Svcs.	\$	0.079	\$	9.9
Total Travel Expenditures	\$	1.956	\$	74.5
Person Trips (Millions)		15.4		309.4
Expenditures Per Trip	\$	127.01	\$	240.79
Average Length of Stay		1.90		2.57
Average Daily Expenditures Per Visitor Per Day	\$	66.85	\$	93.69
Source: Compiled by Market Value Planners, Dean Runyan Associates, Sacramento Convention & Visitor Bureau				

⁴ California Department of Tourism

The overall profile of the Sacramento visitor differs in several respects from the statewide average. First, the share of One Day Visitor expenses exceeds the statewide average significantly and the share of visitors staying in private homes was also significantly above the statewide average. These statistics are consistent with the shorter length of stay measure for the Sacramento visitor.

Table 3 below provides a distribution the same data provided in Table 2, adjusted by average length of stay to daily expenditures per visitor, between primary expenditure categories. Two elements of this distribution stand out; air transportation and travel services along with accommodation expenses are the most variant categories with the statewide average while fuel and ground transportation expenses remain similar. Other expenditure categories range from 20 to 30 percent less than the statewide average.

The Sacramento area visitor profile appears more auto access oriented, consistent with its location at the nexus of Interstate Highways 5, and 80, further served by State Highways 50 and 160. Its State Capitol status and many surrounding State Park, Museum, and other historical and cultural attractions appear to make it a convenient and affordable stopover in the course of a longer trip, with reasonable access for one-day trips from the larger San Francisco/Oakland and north central California population, located within a three hour drive time.

Table 3
Average Daily Visitor Spending by Purchase Category
Sacramento County & California 2002

Expenditures Category	Sacramento		California		% Var
Accommodations	\$ 8.24	12.3%	\$ 14.59	15.6%	-77.1%
Food & Beverage	\$ 16.92	25.3%	\$ 20.75	22.1%	-22.7%
Food Stores	\$ 2.19	3.3%	\$ 2.89	3.1%	-32.2%
Ground Transport & Fuel	\$ 9.84	14.7%	\$ 10.06	10.7%	-2.2%
Recreation, Entertainment	\$ 12.88	19.3%	\$ 15.47	16.5%	-20.1%
Shopping	\$ 14.08	21.1%	\$ 17.48	18.7%	-24.1%
Air Transp. & Travel Svcs.	\$ 2.70	4.0%	\$ 12.45	13.3%	-361.1%
Total	\$ 66.85	100.0%	\$ 93.69	100.0%	-40.2%

Source: Compiled by Market Value Planners, Dean Runyan Associates,
Sacramento Convention & Visitor Bureau

Visitor Attractions

The most popular visitor venues in the Sacramento area include several museum attractions characterized overall, by an “Old California” historic theme. The top 13 area attractions are listed in the table provided below along with their annual visitor counts and share within the ranking.

Table 4
Sacramento Visitor Attendance at Major Attractions
July 2002 Through June 2003

<u>Attraction</u>	<u>Visitor Count</u>	<u>Percent Share</u>
Old Sacramento SHP & RR Museum	640,024	23.1%
State Capitol	531,730	19.2%
Sacramento Zoo	454,720	16.4%
Croaker Art Museum	257,570	9.3%
Esquire IMAX	235,432	8.5%
Discovery Museum	190,900	6.9%
Sutter's Fort	188,259	6.8%
Golden State Museum	58,542	2.1%
California Military Museum	47,335	1.7%
Eagle Theatre	45,164	1.6%
California Indian Museum	44,248	1.6%
Governor's Mansion	38,316	1.4%
Towe Auto Museum	34,334	1.2%
Total	2,766,574	100.0%
Source: Market Value Planners, Sacramento Convention & Visitor Bureau, California Department of Parks & Recreation		

Old Sacramento State Historic Park management estimates that its visitor population can be generally characterized as falling into three distinct groups. Approximately a third of visitors are estimated to be from the pool of 15 million Sacramento area visitors whose trip origin is from outside a 100-mile radius of the Sacramento area. While this segment of visitors comes from nationwide and international origins, it is predominated by California residents, followed by residents of Oregon and Washington. The intersection of Interstate 5, 80, and Highway 50 position Sacramento at the nexus of highway travel in northern and central California.

Another third are characterized as independent visitors whose trip origin is within approximately a 1 hour drive from the park, including a substantial portion from the San Francisco/Oakland Bay Area approximately, 60 to 100 miles to the west. Combined, the resident population of the Sacramento, Oakland, and San Francisco areas, exceed 8 million residents.

Finally a third are characterized as group tour visitors coming from destinations within 100 miles of the park, including a large number of school tours.

The historic theme, natural environment, affordability, and accessibility of the Sacramento area all combine to favor it as an increasingly popular destination within the California visitor market. It is well aligned with several of the key trends emerging in the

travel industries. For example, a recent travel industry survey reveals that 27% of U.S. travelers included a visit to a museum or historic place on their itinerary, while 17% included a cultural event or festival on their trip. Combined, 33% of all travelers included an historic place or cultural event visit in their trip.⁵

The Learning Vacation

In recent years a resurgence of interest has occurred in an approach first introduced by the Chautauqua Institution, located on the shore of Lake Chautauqua, in up-state New York, during the 1880's. The popular Chautauqua Institution offers a variety of adult, and children oriented educational programs for couples, families, and individuals in combination with an array of leisure activities. Resident artists provide a diversity of music, theater productions, and lectures throughout the season.

Another example is the Disney Institute, which recently opened its 58-acre complex in Orlando, Florida, dedicated to the expanding learning vacation niche, patterned closely after the Chautauqua Institution program. Disney offers an array of 60 classes focused within 8 broad interest categories ranging from ethnic cooking to clay figure animation, and film production to set design, and artificial finishes. A typical guest package includes a three-day stay during which two to three, one to two hour classes are attended each day. Rooms, and food and beverage services, and activities are included in each package.

Another popular example of the learning vacation concept is the Elderhostel program, designed for persons over 55, and providing a blend of recreation and light academic programs in a wide variety of subject interests. Programs are offered on a year-round basis but most are presented during the summer months and often use college and university campus facilities to house guests and conduct classes.

The CIHC concept is well aligned with these increasingly popular approaches to meeting the needs of area visitors. Few opportunities are available for knowledgeable and active visitors to experience the natural, cultural, spiritual, and scenic variety of California and its native people. An accessible offering of the scale, depth, and continuity of the CIHC concept, could be expected to compete at a high level of penetration into the existing and emerging visitor market in the Sacramento area and draw heavily from its surrounding northern and central California population centers for the shorter the One Day independent and group visitor segments.

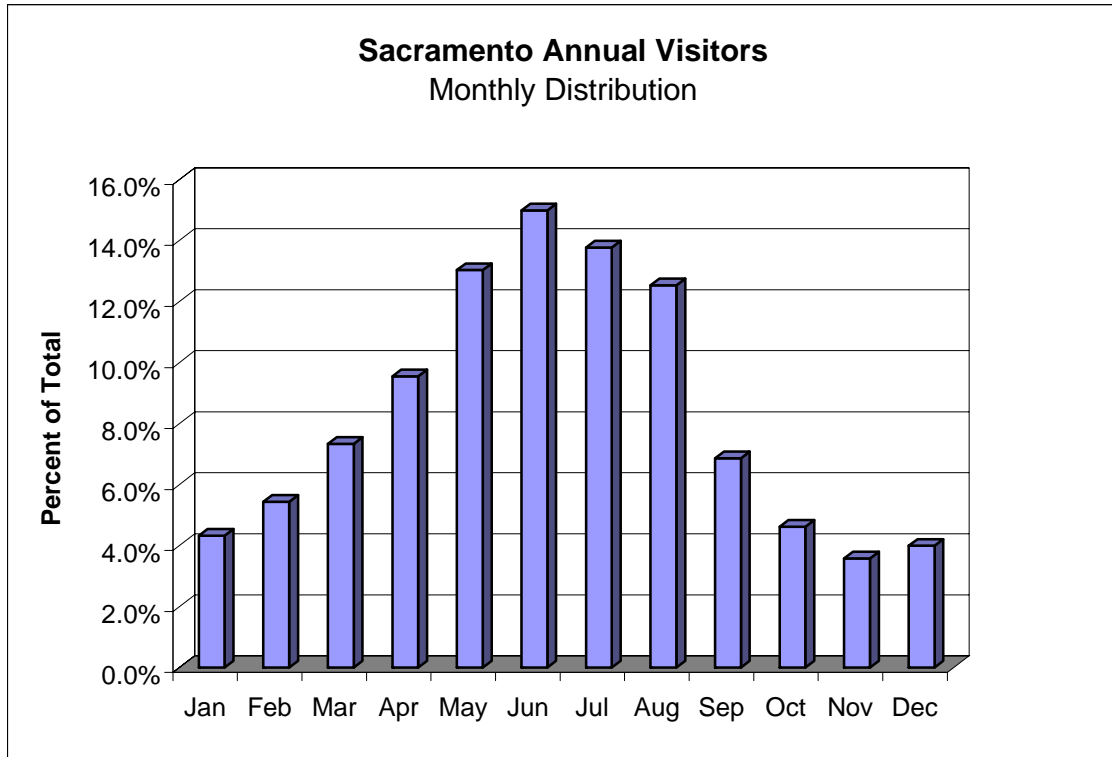
Seasonality of Visits

Sacramento area visitor patterns are highly seasonal, peaking in the summer months of July and August, and falling off during the early weeks of September reaching their lowest levels during the winter period of December through February. Sacramento's overall visitor volume pattern tends to mirror the pattern of its weather, along with the flow of vacation and leisure travel generally, as shown in the graphic below. The graphic

⁵ Western Association of Convention Visitor Bureaus (WACVB), "Tourism in the 21st Century".

illustrates the monthly percentage distribution of visits during the 2002 and 2003 period at the major attraction listed above.

Figure 1



Sacramento's current visitor mix, weighted more heavily toward the leisure classification results in distinct shoulder periods between September and October, and March and April. The meetings and conferencing season typically begins after Labor Day and builds until the Thanksgiving holiday period, falling off abruptly during the year-end holiday season, picking up steadily from February through May until the Summer Vacation period begins. This pattern is evident in the distribution shown above and well depicts the visitor pattern that may be expected at a CIHC located in the Sacramento area.

Estimated Visitor Flow to a California Indian Heritage Center

On a preliminary basis we estimate that a fully developed CIHC program would capture an annual visitor volume of between 700,000 and 900,000 visitors per year from the 15 + visitor base traveling through the Sacramento area, from the approximately 8 million residents located in the greater Sacramento, San Francisco/Oakland, and north central population areas.

In 2002, the Old Sacramento SHP & RR Museum captured about 640,000 visitors, including about one third or 211,200 from the 15 + million base of out of area visitors. This would represent about a 1.4 percent share of the out of area visitors. The California

Exposition reports an annual visitor volume of approximately 1 million during its 18-day event, drawn largely from the northern central California resident population base.

A CIHC offering of the scale and magnitude, of the concept outlined in Section I, would exceed the offerings of any of the major thirteen attractions described in Table 4, above. Considering the variety of outdoor festivals, special events, demonstrations, entertainment, educational, and participative activities contemplated, 700,000 to 900,000 annual visitor volume would imply a 1.5 to 2.0 percent penetration of the out of area visitors, matched by proportionate shares of local regional independent and group travelers.

The table below provides a preliminary estimate of the expected monthly distribution of CIHC visitors, following the general visitor volume patterns depicted in Figure 1, for the thirteen major Sacramento area attractions identified in Table 4, above.

Table 5		
California Indian Heritage Center		
Estimated Monthly Visitors		
Month / Visitors:	Annual	
	Visitor Distribution	
	%	#
Jan	4.33%	38,970
Feb	5.43%	48,870
Mar	7.34%	66,060
Apr	9.55%	85,950
May	13.03%	117,270
Jun	14.99%	134,910
Jul	13.76%	123,840
Aug	12.53%	112,770
Sep	6.86%	61,740
Oct	4.62%	41,580
Nov	3.57%	32,130
Dec	3.99%	35,910
Total Visitors	100.00%	900,000
Source: Market Value Planners		

The distribution suggests that nearly 54% of the annual visitor volume can be expected to occur during the four-month period between May and August, peaking in the June-July period.

Conclusions

The key success factor to be emphasized is the variety of active and participative programs that can be offered through the CIHC concept that will enable visitor interaction with tribal representatives. The California Tribal community in essence holds the franchise on its cultural and natural resource relationships. The Tribes are the most legitimate interpreters, guides, and presenters of their natural and cultural history.

The Sacramento area could be a viable location for the CIHC given its excellent highway access and air travel infrastructure. It is one of the fastest growing visitor centers in California and is quite centrally located within the state with a relatively affordable hosting capacity of other aligned attractions, lodging, and other visitor services.

Our opinion is that a fully developed CIHC concept offering, including the full range of indoor and outdoor space uses, as summarized below, could attract an annual visitor volume of between 700,000 and 900,000 visitors per year.

Indoor space approximately 60,000 square feet providing uses;

- ❑ Main exhibit hall including; lobby, studios, galleries and commercial areas
- ❑ Multipurpose area including, theater, exhibit preparation, demonstration, and lecture halls, classrooms, laboratories and workshop areas
- ❑ Material and artifact collection and storage areas
- ❑ Administrative support offices
- ❑ Commercial areas such as restaurants, gift shops, artisan work and sales areas

Outdoor spaces providing the following uses;

- ❑ Native plant gardens
- ❑ Playing fields and public event areas
- ❑ Traditional meeting areas to accommodate campfire and ceremonial events for designated groups as well as special interest and general public
- ❑ Indigenous village replicas with interpretive centers
- ❑ Overnight RV and or informal camping areas with appropriate support facilities such as toilets and showers
- ❑ Other day use parking sufficient to support expected visitor volume.

Travelers to and visitors within California have ample opportunities to take scenic drives through redwood groves, down coastal roads, through desert landscape, and past scenic rivers. And many opportunities are available to view museum exhibits and displays of every type and kind. To the extent that land and culture are inseparable, a full appreciation of either requires a holistic view of both. Few opportunities are available to have the stories of land, culture, and spiritual renewal, told directly, in the first person, by legitimate practitioners and presenters.

In order for the CIHC to achieve its full potential the California Tribes must assume the ultimate leadership responsibility of host and educator.

Section III
Conceptual Level Construction Cost Estimates

Conceptual Level Construction Cost Estimates

We have used the historical cost method to prepare a base case estimate of the cost to construct the CIHC main facilities described in the concept summary, within the Sacramento area.

The historical cost approach involves the identification and extrapolation from similar (comparable) museum projects, located throughout the United State for which detailed cost experience is available. Our preference is to find comparable project data, that could best be characterized as “close” – “current” – “clones”, to the CIHC project concept under consideration. In other words, a geographically close project, that was recently built, and that embodies as many similar features as the contemplated CIHC project as possible, built to a similar scale, on a similar site.

Comparable cost data is then adjusted to the size and configuration of the facilities envisioned for the CIHC and adjusted by a series of indices related to timing (construction cost inflation in the comparable area) and geographical indices that reflect the cost differentials of various construction cost divisions between various regions.

Several cost estimating systems are available that contain historical data for the construction of facilities such as that contemplated for the CIHC. We have used a proprietary system known as Design For Cost to prepare preliminary estimates, assuming a location in the greater Sacramento metropolitan area.

The system enables us to evaluate construction costs reported for previously built museum projects, organized according to a master format prescribed by the Construction Specifications Institute (CSI) which is recognized as the national standard for construction cost reporting. The format consists of 16 cost divisions, summarized as following table.

Table 6	
Construction Specifications Institute Master Format Divisions	
Division	Representative Elements
00 Bidding Requirements	Bid Packages, Environmental Assessment, Geotechnical Data, Permit Applications
01 General Requirements	Bonds and Certificates, Notice of Award, Agreements.
02 Site Construction	Site Materials, Remediation, Landfill, Excavation, Borings, Piers, Casissons, Water & Sewer Distribution, Interior Roads
03 Concrete	Forms, Reinforcement, Concrete Pouring, Curing, Finishing
04 Masonry	Stone Materials, Simulated Materials, Mortor, Assemblage
05 Metals	Structural Framing, Fastenings, Floor Plates, Fabricated Structural Elements
06 Wood & Plastic	Wood Framing, Finish Carpentry, Paneling, Trim, Structural Plastics

Table 6
Construction Specifications Institute Master Format Divisions

07 Thermal & Moisture Protection	Roofing, Insulation, Moisture Proofing, Flashing
08 Doors & Windows	Doors, Windows, Hardware, Mirrors Glazing Accessories
09 Finishes	Wallboard, Plaster, Tile, Acoustical Coverings
10 Specialties	Fireplaces & Stoves, Plaques, Pedestrian Control Devices, Grills & Screens, Fire Protection Specialties
11 Equipment	Theater & Stage Equipment, Kitchen Equipment, Office Equipment
12 Furnishings	Wall Coverings, Casework, Furniture, Rugs & Mats
13 Special Construction Items	Lighting Protection, Sound Protection, Vibration and Seismic Control
14 Conveying Systems	Elevators, Lifts, Dumbwaiters, Pneumatic Tube Systems
15 Mechanical	Pumps, Vents, Piping, Water Heaters, Heating & Cooling
16 Electrical	Basic Electrical Materials & Methods, Utility Services
Source: Market Value Planners, Design For Cost	

We were able to select several Museum project from the Design For Cost database that closely parallel the facilities envisioned for the CIHC.

The “best in the sample” of projects available was the recently constructed National Civil War Museum, located in Harrisburg, Pennsylvania. Construction of the facilities was completed in February of 2001.

Comparable Project Description

Funded by a \$16.2 million grant from the Commonwealth of Pennsylvania, in addition to other sources for program development and exhibit assembly, the museum provides a picture of the American Civil War from pre-conflict to post-war western expansion, with extensive presentations on both the Union and Confederate war efforts.

The two-story, 66,500-square-foot facility is modeled in keeping with mid-19th Century architecture offering a brick façade, plazas, overlooks, and a grand cupola rising 80 feet into the air above Harrisburg.

The museum is surrounded by the rolling hills of a 90-acre park with large open areas to allow for hosting re-enactor parades, drills, encampments and re-enactments. The building is linked with an entry space named "Lincoln Circle" where visitors either enter the museum or go through the building to the parade grounds.



The parking area is situated on a lower level so that vehicles are not visible from the museum - maintaining the ambiance of a different time and place. Parking consists of 250 car spaces and 15 tour bus spaces.



The central facility houses a 2,200-square-foot gift shop, a cafeteria, two multi-purpose rooms for meetings and private functions, offices, climate controlled storage/archival areas and public amenities

A commercial grade kitchen is included in the improvement. Functions can be accommodated for up to 500 persons at one time.

The National Civil War Museum houses the nation's largest collection of Civil War artifacts.



Table 7
National Civil War Museum
Facility & Equipment Construction Costs - February, 2001
Location: Harrisburg, Pennsylvania

Building Size: 66,500 Sq. Ft.

No. of Floors: 2 Story

Project Height: 83.4 Feet

Site Size: 18 Acres

Foundation: Concrete Poured

Exterior Wall: Masonry

Cost Divisions	Percent of Total	Sq. Ft. Cost	Amount
Bidding Requirements	.56	\$ 1.12	\$ 74,500
General Requirements	3.54	\$ 7.09	\$ 471,461
Site Work	17.56	\$ 35.12	\$ 2,335,209
Concrete	4.00	\$ 8.00	\$ 532,008
Masonry	9.90	\$ 19.80	\$ 1,316,746
Metals	12.42	\$ 24.84	\$ 1,651,624
Wood & Plastics	1.62	\$ 3.23	\$ 215,000
Thermal & Moisture	3.59	\$ 7.18	\$ 477,314
Doors & Windows	4.12	\$ 8.23	\$ 547,533
Finishes	7.82	\$ 15.64	\$ 1,039,961
Specialties	1.68	\$ 3.37	\$ 224,100
Equipment	.71	\$ 1.43	\$ 94,929
Furnishings	1.10	\$ 2.20	\$ 146,336
Conveying Systems	.93	\$ 1.86	\$ 124,000

Table 7
National Civil War Museum
Facility & Equipment Construction Costs - February, 2001
Location: Harrisburg, Pennsylvania

Building Size: 66,500 Sq. Ft.
No. of Floors: 2 Story
Project Height: 83.4 Feet

Site Size: 18 Acres
Foundation: Concrete Poured
Exterior Wall: Masonry

Cost Divisions	Percent of Total	Sq. Ft. Cost	Amount
Mechanical	15.98	\$ 31.97	\$ 2,126,012
Electrical	14.47	\$ 28.95	\$ 1,925,113
Total	100.00	\$ 200.03	\$ 13,301,846

Source: Design For Cost, Hayes Large Architects, National Civil War Museum,
Market Value Planners

In addition to the \$13.3 million construction cost, approximately \$ 5 million was required to assemble the museum exhibit package.

Estimated CIHC Facility Cost

Extending the recent historical cost experience of constructing the National Civil War Museum in Harrisburg to a similar 60,000 square foot facility, located in the Sacramento, California area, with construction being completed in April of 2004, results in a cost of approximately \$ 17.6 million. These estimates are exclusive of outdoor specialty areas, overnight camping facilities, and other development costs including environment assessment, facilities master planning, program planning, financing, and fund raising. Also, the cost estimates do not consider any of the issues related to exhibit acquisition.

The table below provides a summary facilities construction cost for a project similar to the comparable presented.

Table 8
California Indian Heritage Center
Facility & Equipment Construction Costs - April, 2004
Location: Sacramento, California

Building Size: 60,000 Sq. Ft.
No. of Floors: 2 Story
Project Height: 40 Feet

Site Size: 18 Acres
Foundation: Concrete Poured
Exterior Wall: Masonry

Cost Divisions	Percent of Total	Sq. Ft. Cost	Amount
Bidding Requirements	.55	\$ 1.61	\$ 96,489
General Requirements	3.48	\$ 10.18	\$ 610,618
Site Work	19.09	\$ 55.87	\$ 3,352,122
Concrete	3.92	\$ 11.48	\$ 689,036
Masonry	9.71	\$ 28.42	\$ 1,705,398
Metals	12.18	\$ 35.65	\$ 2,139,118
Wood & Plastics	1.59	\$ 4.64	\$ 278,460
Thermal & Moisture	3.52	\$ 10.30	\$ 618,198

Table 8
California Indian Heritage Center
Facility & Equipment Construction Costs - April, 2004
Location: Sacramento, California

Building Size: 60,000 Sq. Ft.
No. of Floors: 2 Story
Project Height: 40 Feet

Site Size: 18 Acres
Foundation: Concrete Poured
Exterior Wall: Masonry

Cost Divisions	Percent of Total	Sq. Ft. Cost	Amount
Doors & Windows	4.04	\$ 11.82	\$ 709,143
Finishes	7.67	\$ 22.45	\$ 1,346,917
Specialties	1.65	\$ 4.84	\$ 290,245
Equipment	.70	\$ 2.05	\$ 122,948
Furnishings	1.08	\$ 3.16	\$ 189,529
Conveying Systems	.91	\$ 2.68	\$ 160,600
Mechanical	15.68	\$ 45.89	\$ 2,753,527
Electrical	14.20	\$ 41.56	\$ 2,493,331
Total	100.00	\$ 292.59	\$ 17,555,678

Source: Design For Cost, Hayes Large Architects, Market Value Planners

Flood Plain Development Alternatives

Two of the candidate sites are located within the 100-year flood zone approximately 10 to 11 feet below their levees. Two approaches were considered as may be required to insure that the built facilities can be protected from flood damage.

The simplest and most straightforward approach is to haul landfill to the site and compact the material up to a safe elevation, based on historical flood experience. Some impacts could result in the surrounding drainage, interference with local habitat, and flood zone drainage patterns.

A less intrusive but more expensive approach is to construct the facilities on a foundation supported by a system of piers and cross beams or grade beams.

Landfill

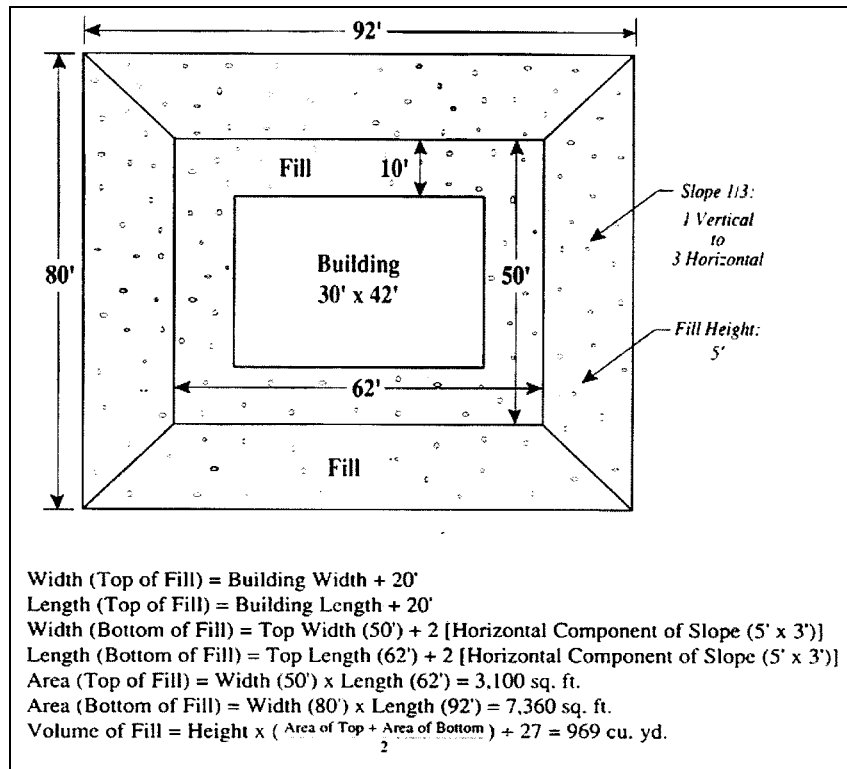
The cost of landfill is largely a function of material availability and distance from the site. Each site is unique, and material availability varies widely over time and across regions. The Army Corp of Engineers in conjunction with the Federal Emergency Management Agency provides some guidance as to cost experience, based on a 1993 survey that provides the most recent data available.⁶

⁶ Coastal Construction Manual, FEMA

The FEMA survey data indicated a cost of approximately \$ 10.00 per cubic yard for landfill and compaction, expressed in 1993 dollars. We estimate that in April, 2004 the base cost, applied in the Sacramento area would be a minimum of \$ 13.80 per cubic yard.

Further, we estimate that approximately 39,741 cubic yards of landfill would be required to elevate a single-story complex of approximately 60,000 square feet to a level about 10 feet above grade. The current cost of such a landfill treatment would be approximately \$550,000. ($39,741 \times \$ 13.80 = \$548,426$)

Figure 2



The illustration above indicates the method used in estimating the fill quantities required using a building size of 1,260 SF (30 X 42) with a ten-foot setback from the edge of the pad around the perimeter of the building. The Corp of Engineers recommends a slope 3 to 1 ratio slope from the base of the fill to the top of the building pad, which we have applied.

We have assumed a set back from the building walls to the edge of the pad of 25 feet, in order to provide some outdoor use and landscape treatments adjacent to the building structure.

Pier and Grade Beam

The pier and grade beam foundation approach enables the building to be constructed on an elevated grid work of steel or pre-cast concrete with significantly less impact on the flood plain environment. This approach also may offer an opportunity to use the space beneath the structure for parking and utility purposes. Attractive landscaping may be applied to screen these below grade uses from view and enhance the overall ambience of the improved site and blend more effectively with the surrounding environment.

The estimated current cost increment required for this foundation elevation approach would be approximately \$ 2,694,000 or about \$ 44.00 per square foot. The 1993 FEMA survey indicated a cost experience of approximately \$32.00 per square foot for the support of multi story masonry structures. These costs include the requirements for extending electrical and plumbing services above the flood plane grade.

Table 9
California Indian Heritage Center
Facility & Equipment Construction Costs - April, 2004

Building Size: 60,000 Sq. Ft.		Site Size: 18 Acres	
No. of Floors: 1 Story		Foundation: Concrete Poured	
Project Height: 40 Feet		Exterior Wall: Masonry	
Cost Divisions	Percent of Total	Sq. Ft. Cost	Amount
Site Alternatives			
Above Flood Plain			
Site Work	19.09	\$ 55.87	\$ 3,352,122
Other Divisions	80.89	\$ 236.72	\$ 14,203,556
Total	100.00	\$ 292.59	\$ 17,555,678
Landfill			
Site Work	21.54	\$ 65.01	\$ 3,900,447
Other Divisions	78.46	\$ 236.72	\$ 14,203,556
Total	100.00	\$ 301.73	\$ 18,104,004
Piers & Grade Beam			
Site Work	29.70	\$ 100.02	\$ 6,001,236
Other Divisions	70.30	\$ 236.72	\$ 14,203,556
Total	100.00	\$ 336.75	\$ 20,204,792
Source: Compiled by Market Value Planners, Design For Cost, Hayes Large Architects,			

A recent example of these approaches to planning and design for structures located in flood plain areas is the William J. Clinton Presidential Center, scheduled to open in November of 2004. The facility is located within a 30-acre park on the south side of the Arkansas River in the capitol city of Little Rock. The facility includes a 20,000 square foot museum, 80 seat theatre and other public spaces.

A rendering of the structure is presented below to illustrate its approach to development in challenging settings such as the Sacramento area.

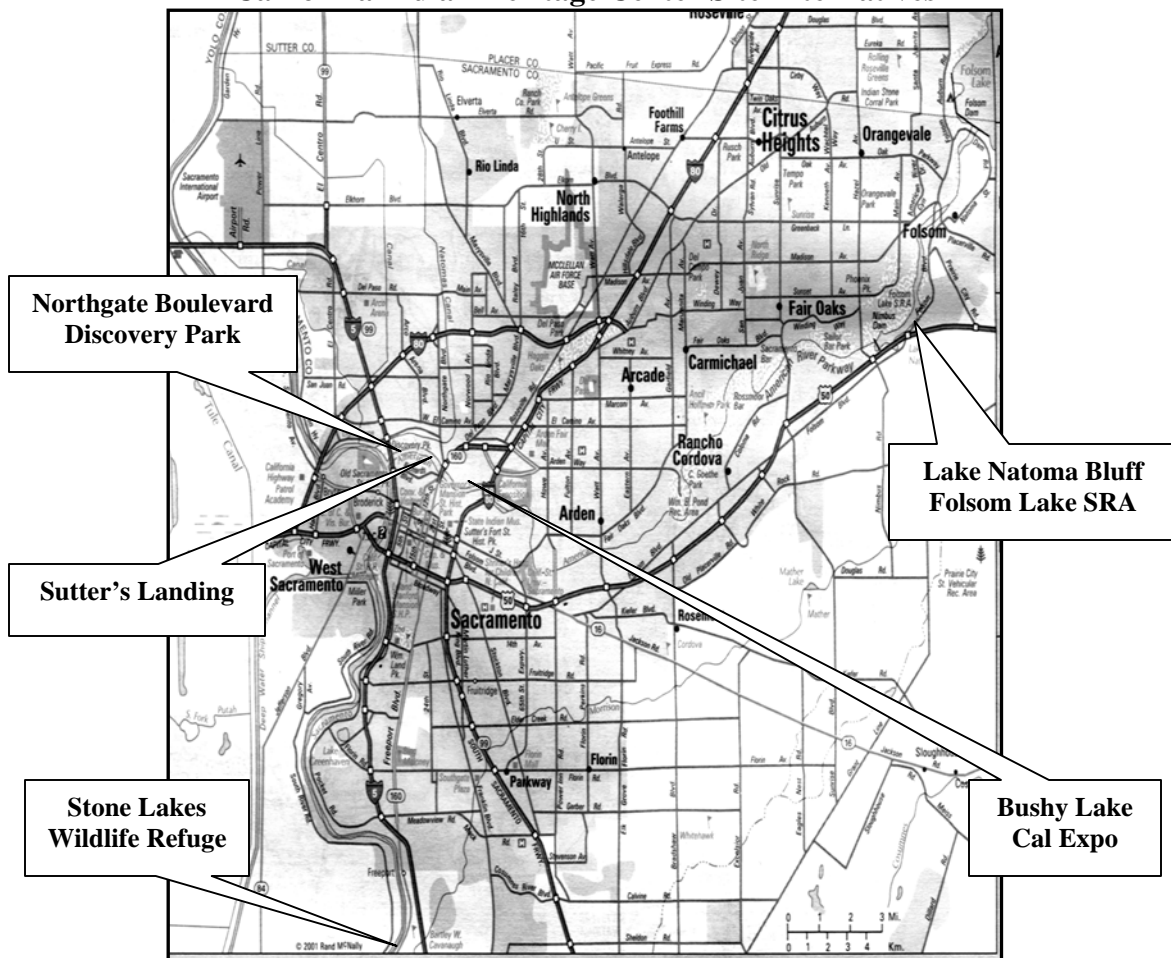


Section IV
Site Evaluations

Site Evaluation

To the extent of available data, we evaluated the features of five site areas nominated for the development as a California Indian Heritage Center. All the sites were located within greater Sacramento Metropolitan area as shown below.

Figure 3
Sacramento Area
California Indian Heritage Center Site Alternatives



Each candidate site is described more fully in the sections that follow, in terms of the features we were able to ascertain from sponsor submissions, site visits, local research, and key informant interviews.

We have described the known features and their strengths and weaknesses in accommodating the development and operating objectives of the CIHC concept outlined above.

Elements of Comparison

To the extent possible, each site has been evaluated on the basis of the comparative elements summarized in the follows.

Site Features

- ❑ Size of specifically designated use areas for the CIHC facilities and improved use areas
- ❑ Topography description including, slope, view features from areas designated for facilities development, vegetation, and other existing landscape features
- ❑ Internal roadways necessary to accommodate anticipated visitor volume
- ❑ Flood hazard FEMA zone classification (insurable features) and impact on development costs
- ❑ Earthquake zone documentation
- ❑ Soil conditions of designated areas within the site and ability to support concept plan structural improvements in terms bearing capacity
- ❑ Seasonal weather condition, eg. degree days, average days of sunshine, annual rainfall, etc.
- ❑ Proximity to potentially adverse conditions such as noise, odors, traffic congestion, airport flight paths, night lighting.

Infrastructure

- ❑ Water sources for potable and irrigation purposes;
- ❑ Sewerage treatment capacity available, eg., gallons per day, or alternatives proposed
- ❑ Transportation Access Capacity, regional and local, up to the site, such as; Roads, Public Transit, Walkways and Trails.
- ❑ Power

- ❑ Communications.

Legal, Land Planning, and Administrative Attributes

- ❑ Current zoning classifications of designated area(s) and identification of planning/permitting authorities;
- ❑ Applicable easements, deed restrictions, or continuing entitlements to the specifically identified sites
- ❑ Estimated land assembly costs
- ❑ Proposed title conveyance method, such as by fee simple or leasehold position and conditions which may attach
- ❑ Current zoning of adjacent properties and prospective land uses.

Area Market Attributes and Penetration Estimates

- ❑ Estimated capture of visitors to the fully developed CIHC offering potential of the site under consideration.

Generic Space Use Estimates

Using the concept and scope ideas contained in the 1991 and 1992 Indian Museum studies, along with the visitor volume estimates contained in Section II of this report we are able to refine the space use requirements of the concept a little further in order to evaluate the relative strengths and weaknesses of the candidate sites in terms of their ability to accommodate the base case CIHC concept. The concept has taken on a character far more encompassing than that of a museum and artifact exhibit center. Its objectives include an active and participative experience of California Indian Culture for native and non-native visitors.

The 60,000 square foot main facility containing exhibit rooms, theatres, conferencing, archival, administrative, and other functions, taken alone, could be accommodated on a site of relatively modest size. Urban planning approaches are well advanced to meet the challenges of land scarcity by using high rise buildings, parking structures, people moving apparatus and the like. We recognize that the CIHC concept is a planning challenge that does not lend itself well to traditional urban park planning approaches.

The outdoor elements, key to the participative and interactive features of the concept, require space and separation from distinct spaces in order to convey the feeling of resource abundance, in a setting of constant natural renewal through the interaction of land, water, and sky. Several “ideal sites” likely exist in California, but not in accessible,

affordable, metropolitan settings, that can accommodate the distinction between a traditional museum and the more comprehensive and interconnected elements of the participative experience embodied in the CIHC concept statements.

Table 10 below summarizes our space use estimates for the project. The initial estimate of land area required of up to 100 acres was offered in a study completed in 1991.⁷ While 100 acres of land could be beneficial to help create separation and place between the CIHC program elements, we have attempted to focus the land requirement somewhat by applying accepted space use standards where possible such as for the central built facilities, parking and campground uses. Other space use areas area requirements remain difficult to estimate without further specification of a range of program alternatives.

Table 10 California Indian Heritage Center Preliminary Space Use Planning Estimates for Full Build-Out	
Space Use Elements	Required Acreage
Central Facilities - Exhibit, Archival, Conference, Theatre, Shops, Administration, Shipping & Receiving. Assume a cluster of buildings (60,000 square feet of usable space) at 1 to 1.5 stories in height with footprints of 45,000 to 60,000 square feet, assuming a net to gross absorption of 50 percent in order to provide adequate buffering areas between the central facility and adjacent parking and other service areas.	2 to 3
Visitor and Employee Parking – Visitor parking to include 430 surfaced auto spaces and 11 Bus spaces with additional overflow parking areas of 360 auto spaces and 9 bus spaces, sufficient to accommodate peak load usage. Also an additional 75 employee and resident artist spaces will likely be required. Total hardened auto and bus parking of 516 spaces plus overflow spaces of 365.	6 to 8
Native Plant Gardens – Representing significant northern, central, and southern environs, open and possibly enclosed with appropriate separation between each thematic setting.	5 to 6
Sport Fields - Play areas, seating and interpretive areas.	1 to 2
Ceremonial Event Areas – Sufficient to accommodate three to five regional themes, adequately buffered for exclusive use.	1 to 2
Outdoor Amphitheatre – Seating 120 to 150, with stage and production area.	1 to 2
Outdoor Foodservice & Picnic Area -	1 to 2
Traditional Meeting Areas – Ideally near a water feature, either natural or man-made and able to accommodate public access during the peak period of the year and able to be cordoned in part or in whole for scheduled exclusive use.	3 to 5
RV & Informal Campground - About 40 RV sites with full hook-ups including central vault-toilets, showers, campground store and central check-in, in addition to approximately 30 to 40 informal campground sites	5 to 6
Traditional Village Replicas – Three to five regional representations.	20 to 40
Sub-Total of Acreage Required	45 to 76
Interior Roads, Trails, & Walkways at 10 percent of individual space requirements	5 to 8
Total Acreage	50 to 84

⁷ “California Indian Museum Study”, Department of Parks & Recreation, October 1991.

The estimated range of 50 to 80 acres should not to be considered hard fast and final but is helpful as guideline for evaluating the potentials for each site considered, where trade-offs may need to be made between a candidate site's strengths and weaknesses in accommodating the most compelling and comprehensive expression of the CIHC concept.

Traffic Flow & Parking Requirements

The table below provides a planning measure of the parking requirements and traffic flow impact of the project based on the monthly visitor volume estimates contained in the Market Study Section II (Table 5) presentation, distributed by expected daily visitors throughout the week. The purpose of the presentation is to establish a preliminary measure of the traffic volume impact at the site entrances and internal parking requirements to sustain the estimated visitor volume. While the table is somewhat tedious it is useful in capturing a better picture of the seasonal and weekly flow considerations that will need to be addressed in the forward planning processes.

Table 11
California Indian Heritage Center
Estimated Daily Visitor Traffic Volume & Parking Usage

Month / Weekly Average Daily Visitor Distribution	Average Daily Distribution Each Week							Total
	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	
Jan	2,471	971	706	706	706	1,059	2,206	8,824
Feb	3,430	1,348	980	980	980	1,470	3,063	12,251
Mar	4,188	1,645	1,197	1,197	1,197	1,795	3,739	14,958
Apr	5,631	2,212	1,609	1,609	1,609	2,413	5,028	20,110
May	7,435	2,921	2,124	2,124	2,124	3,186	6,638	26,553
Jun Peak Usage	8,838	3,472	2,525	2,525	2,525	3,788	7,891	31,565
Jul	7,851	3,084	2,243	2,243	2,243	3,365	7,010	28,041
Aug	7,150	2,809	2,043	2,043	2,043	3,064	6,384	25,534
Sep	4,045	1,589	1,156	1,156	1,156	1,733	3,611	14,446
Oct	2,636	1,036	753	753	753	1,130	2,354	9,415
Nov	2,105	827	601	601	601	902	1,879	7,518
Dec	2,277	894	650	650	650	976	2,033	8,131
Total Visitors	4,846	1,904	1,385	1,385	1,385	2,077	4,327	17,308
Times 52 Weeks Annual Visits =								900,000
Peak Load Daily Parking Requirements June								
Auto Visitors @ 80 %	7,071	2,778	2,020	2,020	2,020	3,030	6,313	
Persons Per Auto	3.0	3.0	3.0	3.0	3.0	3.0	3.0	
Daily Auto Traffic	2,357	926	673	673	673	1,010	2,104	
Average Hours Per Stay	4	4	4	4	4	4	4	
Hours of Operation	12	8	8	8	8	8	12	
Avg. Auto Space Occupancy	786	463	337	337	337	505	701	
Bus Visitors @ 20 %	1,768	694	505	505	505	758	1,578	
Persons Per Bus	30.0	30.0	30.0	30.0	30.0	30.0	30.0	

Table 11
California Indian Heritage Center
Estimated Daily Visitor Traffic Volume & Parking Usage

Month / Weekly	Average Daily Distribution Each Week							Total
	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	
Daily Bus Traffic	59	23	17	17	17	25	53	
Average Hours Per Stay	4	4	4	4	4	4	4	
Hours of Operation	12	8	8	8	8	8	12	
Avg. Bus Space Occupancy	20	12	8	8	8	13	18	
Peak Auto & Bus Spaces Required	806							
Peak-Load Parking Space Requirements June								
Auto Space Gross SF = 360 SF ea	282,825							
Bus Space Gross SF = 720 SF ea	14,141							
Total Peak Space Requirements	296,967							
Total Peak Parking Space Acreage	6.8							
Source: Market Value Planners								

At full market penetration, a project site would require approximately 6 to 8 acres of parking area for automobiles and buses in order to serve peak-load visitor usage of approximately 8,800 visitors on a given Sunday in June.

The estimate in Table 11 does not consider the traffic volume requirements that might be accommodated by any variety of public transit possibilities that may be available at a given site or the availability of off-site parking accommodations.

The peak-load (Sunday in June) traffic and parking requirements would indicate a traffic flow of approximately 2,400 vehicles per day (59 buses and 2,357 autos), distributed over a 12-hour day of operation, or an average of 200 vehicles per hour coming in and out of the facility.⁸

This estimate is based on the assumption of 3 persons per car. Adjusting the approach to a more conservative factor of 2.5 persons per car results in an estimated parking requirement of 8 acres.

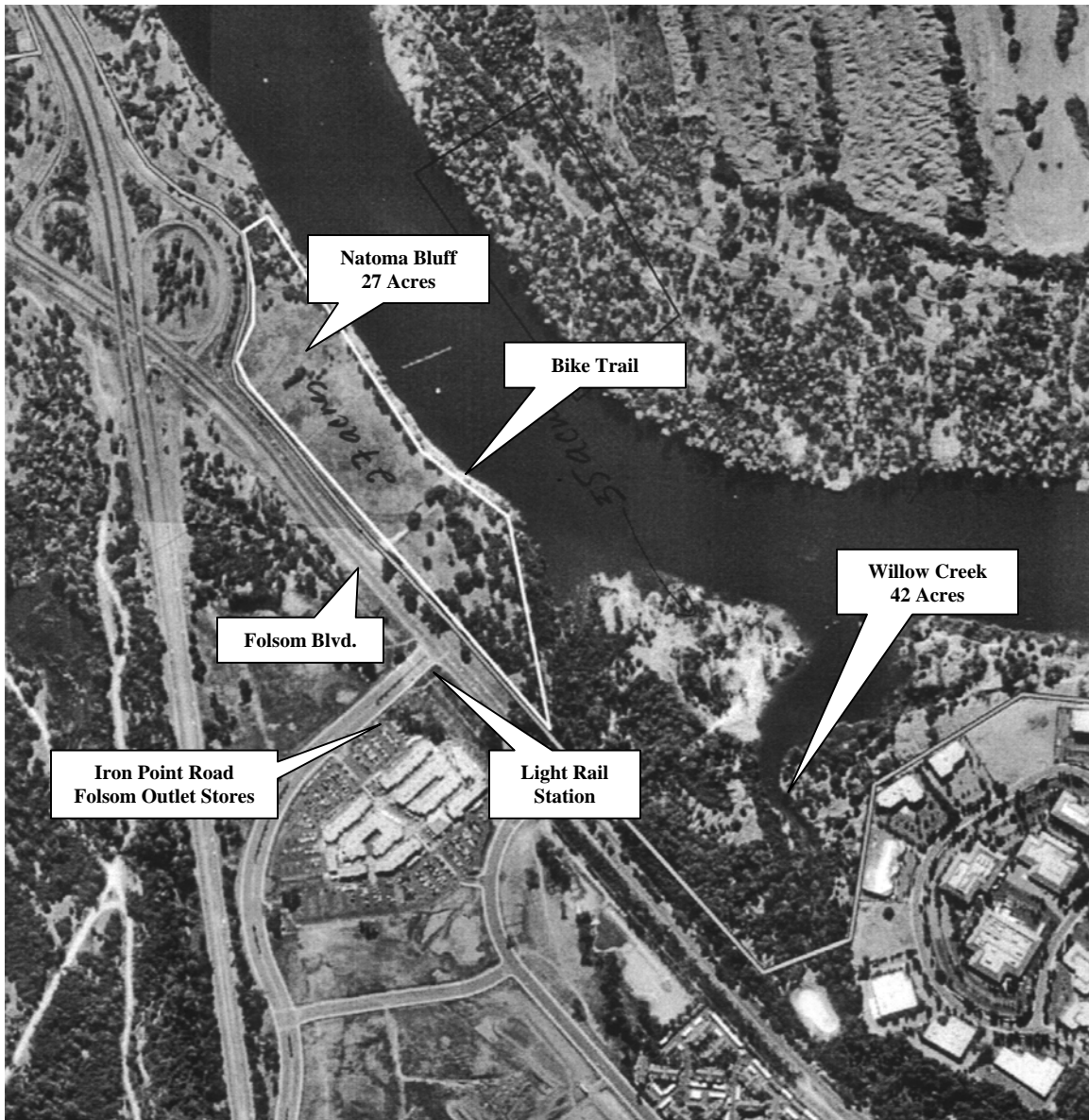
These spaces would likely consist of a mix of fully improved spaces, plus an area for less improved overflow parking, perhaps within an accessible grassy multi-purpose, or partially improved dedicated parking area on or off site. By way of contrast, the same calculations contained in Table 11 applied to average annual Sunday visitor volume results in a required parking area of between 3 and 4 acres to provide approximately 430 automobile spaces and 11 bus spaces.

⁸ Incidentally, this estimate would imply a peak-load visitors-at-one-time estimate of about 2,900 persons. (8,838 visitors / 12 hour of operation X 4 hours on site per visitor = 2,946)

Lake Natoma Bluff

The Lake Natoma Bluff site is located within the Folsom Lake State Recreation Area and has long been considered by DPR as a candidate site for the development of an Indoor/Outdoor State Indian Museum complex. DPR and the City of Folsom have recommended the site for consideration.

The proposed site consists of approximately 27 acres of developable area, located at the junction of Highway 50 and Folsom Boulevard, next to Lake Natoma, as shown in the aerial photo below.



The site is predominately grassland, populated with spectacular stands of native blue oak. A hardened bike trail extends along the bluff edge, serving in excess of 10,000 cyclists

per week, during its peak season. This bike trail extends some 34 miles from Willow Creek to Discovery Park in Sacramento as part of the American River Parkway trail system. The adjacent Willow Creek area is currently the only access point to the Natoma Bluff site via the bike trail and other walking paths. Limited parking, day use, and boat launch facilities are in place at Willow Creek.

The City of Folsom has expressed its support for the location of the CIHC complex at this site.

Opportunities & Strengths

Infrastructure - The site provides good access to required infrastructure. A 20" sewer lines run parallel to the site along Folsom Boulevard. Municipal water is represented to also be available along Folsom Boulevard next to the site, including power and communications.

Accessibility – Generally good access and egress is available from Highway 50 at the Folsom Blvd., exit to the site. A light rail transit station is under construction across from Folsom Blvd., adjacent to the Bluff site. This improvement will provide rail access to the site from throughout the Sacramento metropolitan area.

No immediate access to the site is currently available. The City of Folsom is willing to apply for federal funding to construct a two-lane turnout and traffic control system for the site at the junction of Folsom Boulevard and Iron Point Road, adjacent to the site. The expected current cost of the project is \$750,000. Traffic engineers with the City are confident that the two lane turn out proposed could accommodate up to 300 vehicles per hour, more than the 200 vehicles per hour, peak-load (Sunday-June) estimate requirement described in Table 11, above. The City of Folsom, through the Federal Housing and Urban Development Administration would apply for funding for the traffic turnout. Federal budgeting cycles typically run on a three-year time schedule from application to funding.

Soil Conditions – Soil conditions in the area do not appear to pose any significant barriers to development. The site is not in a flood plain area.

Land Assemblage Ownership and Control - The 27 acre parcel, shown above is owned by Department of Parks and Recreation (DPR). The Bureau of Reclamation (BOR) is the owner of the strip of land surrounding the parcel extending to Lake Natoma. These lands are administered by DPR under a lease agreement with BOR. The existing lease agreement sunsets in 2006 and discussions are underway between the agencies regarding a new ongoing agreement. The BOR has supported the concept of development of an Indian Museum at the site since its inclusion in the existing General Plan for administration of the SRA.

Planning Environment – The lead agency for the project would be DPR in conjunction with BOR. The 1978 State Park General Plan identifies the possible planned use of the

site as a State Indian Museum/Cultural Heritage Center. An update to the General Plan and the BOR Resource Management plan is now under joint development. It is expected that support for a complex, of acceptable scale and proportion, would continue to be embraced by both the DPR and BOR. Because of federal ownership of the lands, both NEPA and CEQA environmental reviews of proposed improvements would be required.

Timeline of Availability – The Natoma Bluff site could be available immediately, subject to a more definitive use plan for the proposed project. The timing of the General Plan update, now under way is advantageous.

Threats & Weaknesses

Site Size - Although the site offers a marvelous view out over Lake Natoma, its size (27 Acres) would significantly constrain the scope of the indoor and outdoor elements of the CIHC concept able to be offered. The orientation of the facilities would likely be away from the Folsom Blvd. corridor and over the lake. However, the existing bike and walking trail will need to remain available compromising the sense of place and exclusive use. Direct access to the water is not possible from Natoma Bluff, which is approximately 40 feet above the waterline. Water access would be possible on a non-exclusive basis via the adjacent Willow Creek day use boat launch and day-use area. Water access from Willow Creek is compromised somewhat by the stone tailings remaining from historic mining operations and will limit interpretation of pre-contact relations with the land. These tailing features are considered to be an element of historic significance in the overall SRA General Plan for the area. These features are shown in the site photo included below taken from the Willow Creek boat launch area, facing Natoma Bluff.

The native blue oak grove is also a protected element of the site, which will further constrain its development potential.

Parking – The site presents challenges in the development of adequate parking facilities, located close to the main cultural center. Its narrow configuration, protected oak and other plant species may constrain the ability to provide ample and convenient parking. This constraint might be mitigated to some extent by shared weekend use of planned light rail station parking facility under construction across Folsom Boulevard at the corner of Iron Point Drive.

Ambiance - Although the site offers a marvelous view over Lake Natoma, the immediate area has been undergoing steady housing and commercial development over the past years. Much of bluff area on the opposite side of the lake from the park has been absorbed in residential development. The site provides some challenge in achieving an experience of being separated from the surrounding urban environment.

Visitor Mix – State Park staff caution that along with the significant increase in the suburban development around the Natoma area, they have noticed an increase in the level of petty crime and vandalism incidents taking place. They caution that additional

security should be considered for isolated facilities. The existing bike trail and general park visitor access to the site would likely remain, limiting possibilities for exclusive use.

Overnight Accommodations - Camping facilities are limited throughout the recreation area. No area within the proposed site confines would be available for the development of overnight campgrounds. However, park management indicates the possibility of converting some existing overnight campground space, located approximately three miles to the east, which could be reserved for CIHC event participants.

Expected Visitor Capture – Because of the site's size limitations we would anticipate that a CIHC offering would be limited in both size and scope to somewhat less than half that of the full concept. Approximately half of the Natoma Bluff area is covered by native blue oak, leaving a net developable area of approximately 27 acres. Absent available space within the adjacent Willow Creek area, the site will accommodate very few of outdoor offerings contemplated in the CIHC concept.

We do not expect the site to enable a CIHC offering to attract the 700,000 to 900,000 visitor potential of a larger site located closer to the complement of services and activities available closer in to the central Sacramento center.

Natoma Bluff Site Photos



Natoma Bluff Site Area Water Edge Promontory From Willow Creek

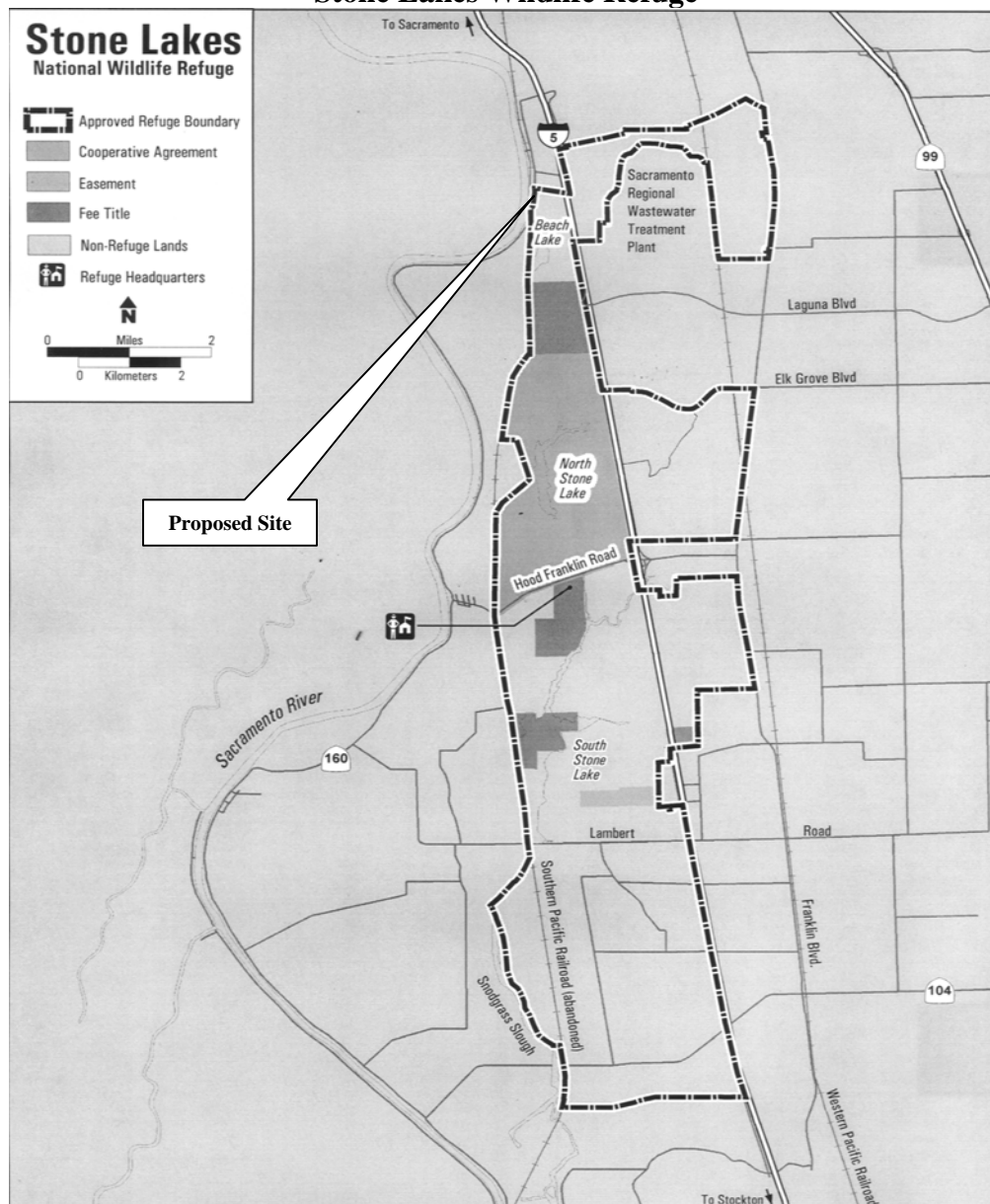


Natoma Bluff Grasslands Blue Oak & Bike Trail

Freeport - Stone Lakes

The Freeport - Stone Lakes site is located adjacent to Interstate Highway 5, in the Elk Grove area, approximately 12 miles south of downtown Sacramento and at the northern boundary of the Stone Lakes National Wildlife Refuge. The U.S. Department of Fish and Wildlife (Department of Interior) is the lead management agency for the refuge. The designated refuge area consists of approximately 18,200 acres of land, contained within the dashed line perimeter of the map shown below.

Figure 4
Stone Lakes Wildlife Refuge



Currently, about 4,000 acres have been partially to fully secured through intended donations, cooperative agreements, easements, or direct land purchases. The more darkly shaded areas within the dashed boundary represent the controlled land parcels, with the balance remaining in other ownership.

The State of California owns a significant parcel in the North Stone Lakes area, which is managed by Fish and Wildlife through a cooperative agreement.

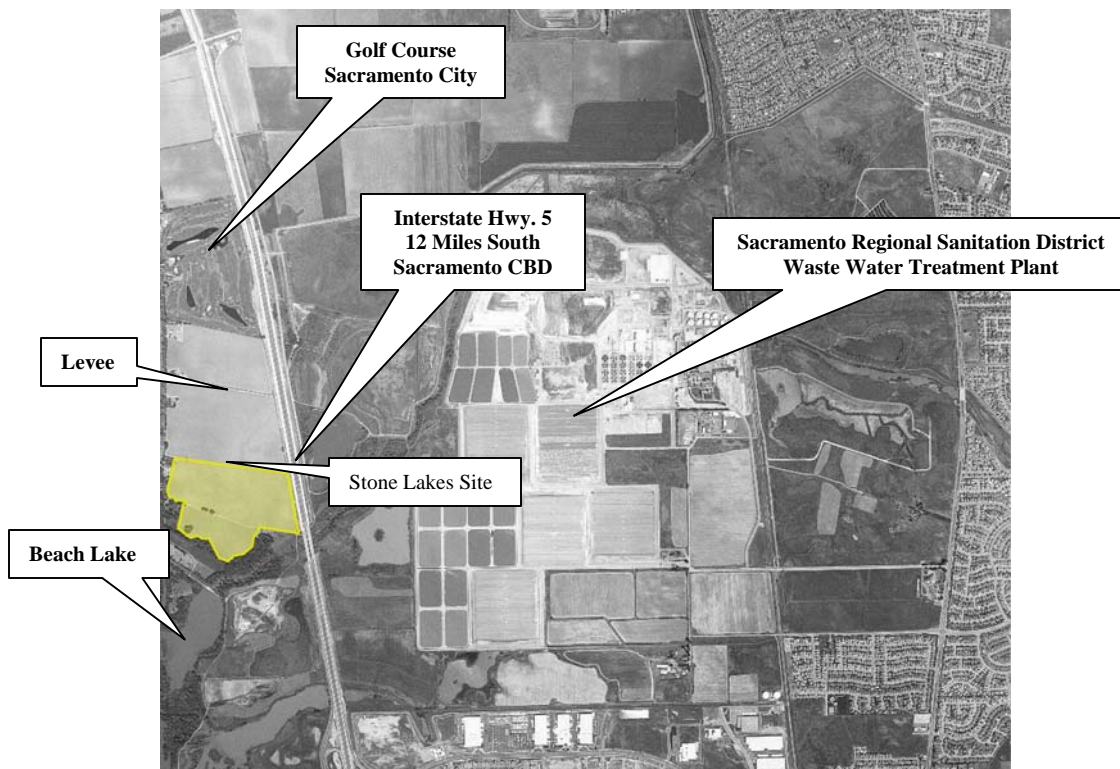
The Stone Lakes Basin is located in watersheds created by the Cosumnes and Mokelumne Rivers and the Sacramento-San Joaquin River Delta System. The refuge area supports over 200 species of wildlife, including about 170 bird species.

The Plains Miwok originally inhabited the area. Reportedly, they constructed their homes from tules and wove baskets and implements from the grasses growing along the local waterways. Many significant Miwok cultural sites are contained within the area.

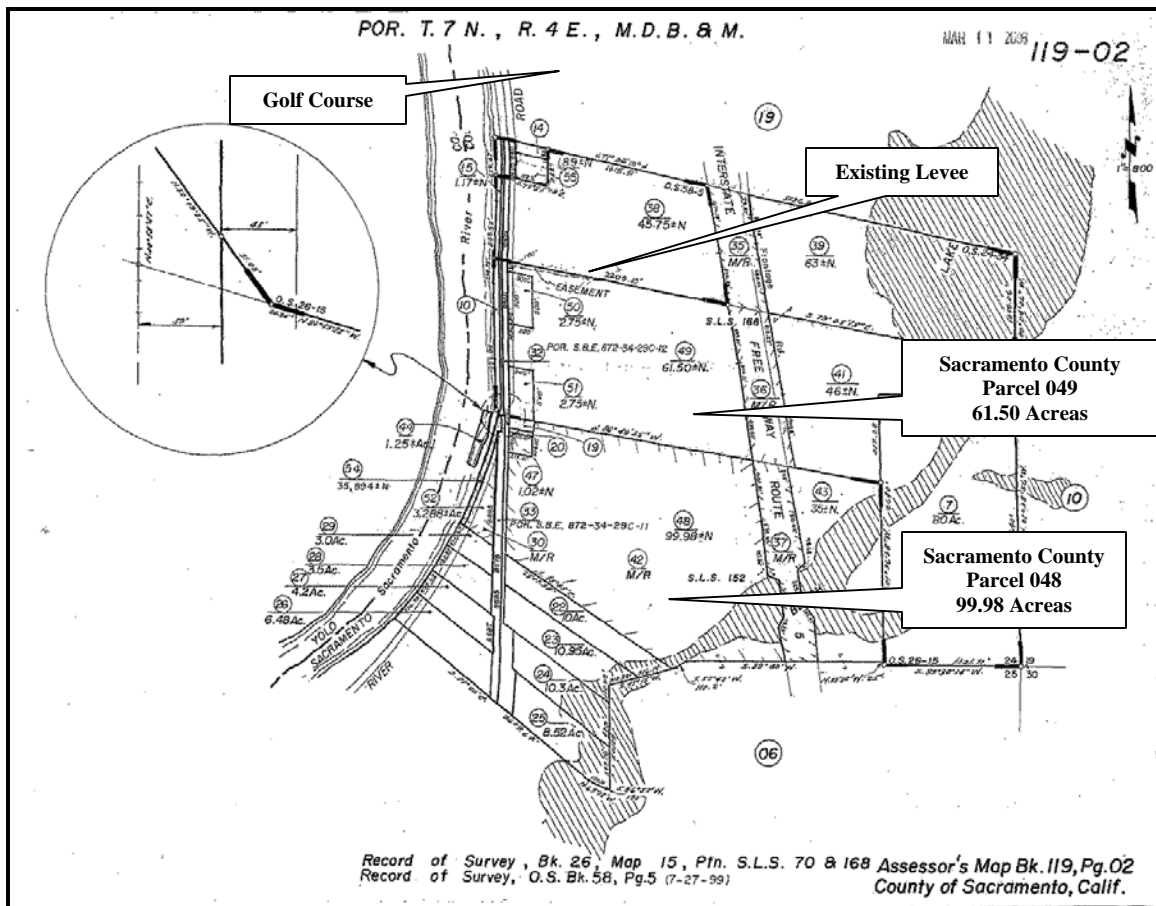
Freeport – Stone Lakes Parcels

Within the refuge, several sites have been identified as potential candidates for a CIHC location, mostly held in private or local public ownership.

The most promising of these locations are two adjacent parcels located at the northern tip of the refuge area west of Interstate 5, adjacent to Beach Lake. These parcels are highlighted by the lightly shaded areas to the left of the aerial photo shown below.



The parcels are owned by the Sacramento County Sanitation District and consist of a total of approximately 161 acres combined. The plat map shown below identifies the location of the parcels in relationship to the features shown on the aerial map provided above.



The parcel located to the north of the two Sacramento Sanitation District parcels in-between the golf course is privately owned by the Komoorian Estate and is approximately 46 acres in size. Two additional small parcels, 2.75 acres each in size, fronting on River Road, are privately owned.

Opportunities & Strengths

Accessibility – The site is located approximately 12 miles south of downtown Sacramento via Interstate Highway 5 adjacent to the town of Freeport. Currently, access is by the Pocket Road exit of Interstate 5, and entry by River Road along the Sacramento River levee.

Future plans include the construction of an exit ramp from Interstate 5 at the Freeport over crossing, which would improve accessibility somewhat.

Market Value Planners

Flood & Soil Conditions – The sites are within the 100-year flood plain and have been partially inundated as recently as 1997. These lands are within the jurisdiction of the Sacramento Area Flood Control Agency (SAFCA). A levee currently bounds the northern portion of the property. SAFCA has considered a reconfiguration of the levee so as to protect some of the area from flood hazard.

Site Size - The combined size of the two parcels is approximately 160 acres. This would be sufficient to accommodate both the Heritage Center central indoor facilities and provide access to well buffered outdoor areas both within wetland environs and outside to the north of the SAFCA renovated levee.

Part of a project development plan for the site might include wetlands restoration approaches providing direct water access that would be well aligned with the needs of CIHC concept and the overall Stone Lakes Wildlife Refuge mission.

Partnership Potentials – The refuge management goals and objectives of the Fish and Wildlife Department are quite well aligned with those of the CIHC. In addition to their land acquisition tasks, they are also charged with a significant interpretative and wetland restoration function. Many opportunities would be available for the CIHC and the Stone Lakes Wildlife Refuge to collaborate in their program development and interpretive functions.

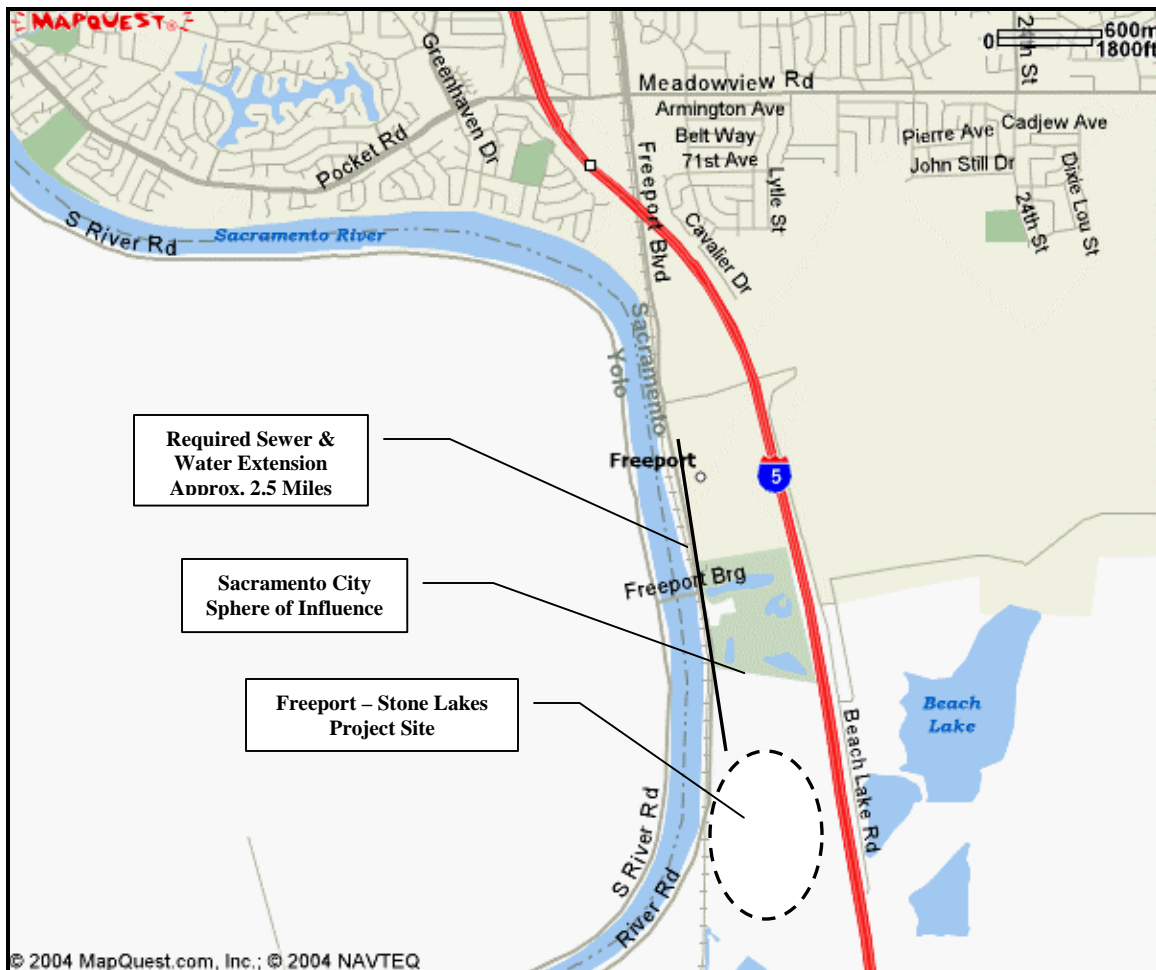
Adjacent Land Uses – All adjacent land parcels to the south are located within the designated refuge area. Success of the refuge assemblage efforts will result in a cumulative benefit the CIHC. A municipal public golf course is located directly to the north of the property. This recreational use offers some variety in available immediate area activities for CIHC visitors.

Threats & Weaknesses

Utilities – Currently, the parcels are not served by sewer or water distribution systems. Land users in the area depend on well water and leach field septic systems. The nearest water and sewer main facilities are located approximately 2.5 miles to the north.

Generally, the land area extending to the southern boundary of the golf course, one parcel north of the candidate sites, is contained within the Sacramento City sphere of influence and subject to annexation into the City boundary, subject to approval of the Local Area Formation Commission. The City is actively considering an annexation and the possible extension of sewer and water services south as far as the golf course complex. The estimated cost of this extension is approximately \$ 3.5 million.

The location and distance of these features are shown in the map provided below.



Land Ownership – The Sacramento County Regional Sanitation District currently owns the nominated parcels. No commitment has yet been made for the sale of the parcels.

Should the Sanitation District be amenable to a disposition of the parcels it may be possible for them to be purchased by Fish and Wildlife and then deeded to the State in exchange for properties of “equivalent value” held by the State, possibly within the refuge. No Federal funding has been appropriated for this purpose.

Planning Environment – The planning jurisdiction for the parcel is the County of Sacramento and the parcels are currently zoned for agricultural use. Any transaction would be subject to appropriate entitlements.

Land Condition – Currently the parcels are leased to a farming operation. They would require substantial restoration over an unknown period of time to restore them to their pre contact condition. The parcels do not provide direct river access. The Sacramento River flows adjacent to the parcels, across River Road, the rail line and levee to the east.

While proximity to Interstate Highway 5 is a positive accessibility feature, noise from the highway could impact the visitor experience.

Expected Visitor Capture – While the Freeport - Stone Lakes site is located within reasonably close proximity to downtown Sacramento and the intersection of Interstate Highways 5, 80, and Highway 50, somewhat less penetration of the full visitor potential may result. The marginal visitor, planning two or three activities during their stay that are located close in to the downtown area may opt for an alternative rather than confront the time and financial cost of trip to the fringe of the city.

We would characterize the location features of this site as a potential threat as opposed to a decided weakness. Of the approximately 15.4 million visitors to Sacramento reported in 2002, approximately 9 million were in the City of Sacramento or about 60 percent.⁹

American River Parkway

Three sites have been proposed for consideration within the Lower American River (LAR) corridor.

Generally the LAR corridor extends from Folsom Dam, approximately 35 miles to the east of downtown Sacramento along the American River to its confluence with the Sacramento River. The Sacramento Area Flood Control Agency (SAFCA) in collaboration with other regional and state agencies maintains a LAR Corridor Management Plan.

Currently, the LAR Corridor plan is in the process of being updated and may provide an opportunity for inclusion of concepts such as the development of a CIHC offering within its boundaries, if appropriately scoped.

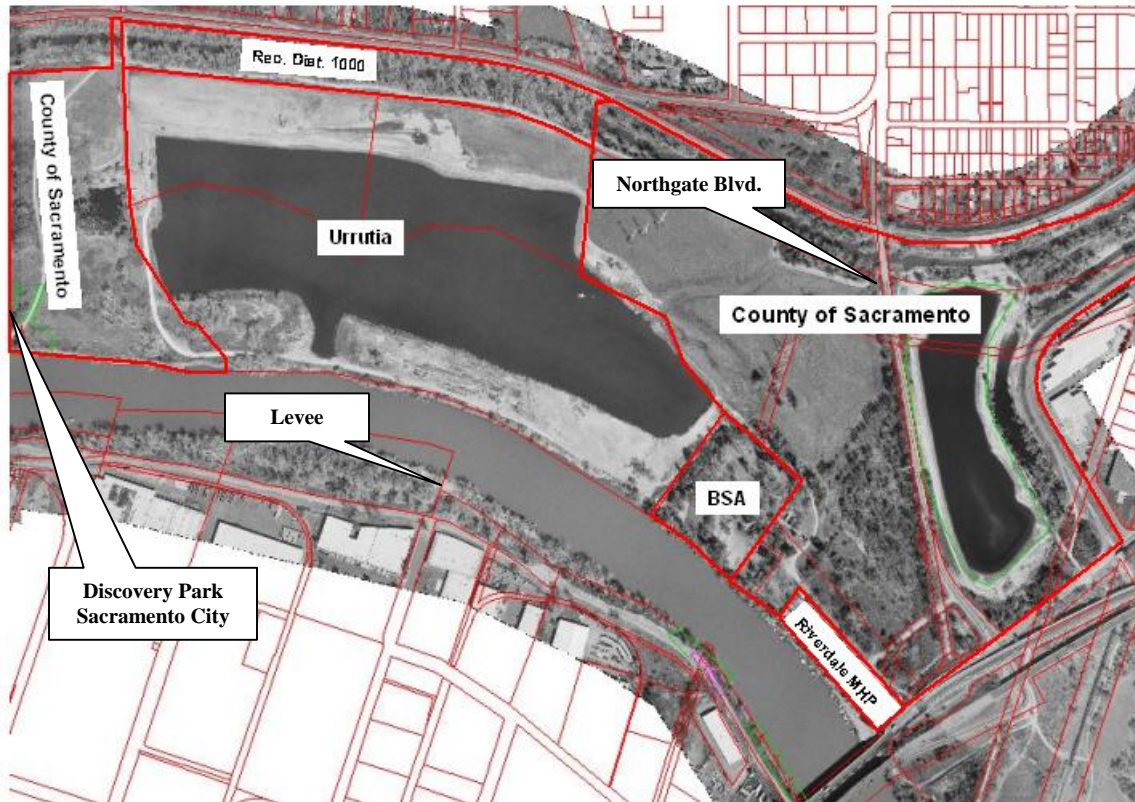
Lands located below the levees along the LAR corridor are administered by SAFCA. Two of the nominated sites are located below the levee structure within SAFCA's jurisdiction.

Northgate Boulevard

The Northgate site consists of several parcels, some of which are privately owned. These parcels are situated on the north side of the American River at an elevation of approximately 20 feet above sea level and approximately 10 to 11 feet below the levee constructed on the Sacramento (south) side of the river.

An aerial photo of the site is provided below indicating the private and public ownership of the parcels. The area to the left (west) of the Urrutia site is improved as Discovery Park, which extends eastward along the American River to its confluence with the Sacramento River. The site provides excellent access to downtown Sacramento attractions and amenities.

⁹ Sacramento Convention and Visitor Bureau, Dean Runyan Associates



Access to the site is via Northgate Boulevard to the northeast. Parcel ownership and sizes are summarized in the table provided below.

Table 12
Northgate Boulevard Site Ownership

Parcel Owners	Acreage
Henry Urrutia	76.3
Camp Pollock Boy Scouts of America	15.2
Riverdale Mobile Home Park	6.6
Sub Total	98.1
Sacramento County	103.1
Total	201.2
Source: Sacramento County Records	

SAFCA has expressed an interest in working with the Task Force and the State Department of Parks and Recreation in connection with the acquisition of the sites for the purpose of developing the CIHC project.

The approach suggested would be for the parcels to be acquired by SAFCA using State sources of funding available through Proposition 250, designated for flood area improvements, and then deed the properties in fee to DPR, subject to project design approval. Proposition 250 funding availability will remain available through the 2006 fiscal year.

The Riverdale mobile home park parcel owner has expressed an interest in divesting its property and relocating the existing lessees.

The Urrutia parcel owner has not indicated a strong interest in a sale but has not rejected the concept out of hand. The Urrutia parcel has been used for several years as a gravel-mining site and would require significant restoration efforts, if included in a land assemblage program for the project.

The Camp Pollock owners have not expressed a strong interest in a divestiture having been long time users of the property in connection with their Scouting and area youth programs. However, contacts with the owners indicate a favorable disposition to the project and a willingness to work cooperatively and positively toward a mutually agreeable use of the surrounding properties in the interest of their constituency and the surrounding community.

Opportunities & Strengths

Site Size – The site would be ample in size to accommodate the built facility needs of the CIHC concept and provide adequate buffering and separation between indoor and outdoor uses, including space for overnight camping facilities. Some terracing of the steep riverbank could provide good access to the water. While acquisition of the Urrutia parcel would be a plus, given its extended river access and sculptured pond feature, its exclusion from the program is not fatal.

Ambiance – The parcels, if well landscaped could provide an excellent experience of the natural environment, with good opportunities for land and water improvements, quite suitable to the objectives of the CIHC program.

Accessibility – The site is readily accessible via Northgate Boulevard, via Arden and is adjacent to the Sacramento downtown.

Adjacent Land Uses – The Discovery Park facilities and grounds located directly to the east along the river are absolutely compatible with and complimentary with the operations of a cultural center.

Infrastructure – Major sewer, power, and water access runs directly past the property to the east along Highway 160 and along Northgate Boulevard. A sewer line is available along Highway 160. A lift station will likely be necessary given the elevation of the property. A Sacramento City, 30" water main is in place along Northgate Boulevard.

Electrical, natural gas, and communications are in place serving the Riverside mobile home park but will likely require upgrade.

Expected Visitor Capture – Given the locations proximity to the downtown activity centers, while providing the ability to create a sense of isolation and place, we would expect the this site to offer the ability to capture full visitor penetration.

Threats & Weaknesses

Soil and Flood Conditions – The site is location at an elevation of 10 to 11 feet below the river levee and would require significant incremental expense in the construction and operation of a CIHC facility. From time to time portions of the project could be rendered inaccessible during the winter and spring flood season.

Site Photos



North Shore American River Adjacent to Trailer Park



Urrutia Pond Facing East

Bushy Lake Cal Expo

This site is located adjacent to the State owned California Exposition to the southeast below the levee. The parcel is approximately 300 acres in size and is owned by the State of California.

Opportunities & Strengths

Site Size:

Site Size – The site would be ample in size to accommodate the built facility needs of the cultural center and provide adequate buffering and separation between indoor and outdoor uses, including ample space for overnight camping facilities.

Infrastructure – Major sewer, power and water access runs directly past the property to the north, adjacent to the Cal Expo site.

Threats & Weaknesses

Soil and Flood Conditions – The site is location at an elevation of 10 to 11 feet below the river levee and would require significant incremental expense in the construction and operation of a CIHC facility. From time to time the project could be rendered inaccessible during the winter and spring flood season.

Market Value Planners

Ambiance - The presence of overhead power distribution wires and towers will continue to interfere with the creation of facility and operation of a program that provides an of the unspoiled. Little opportunity exists at the site to achieve a view orientation away from either the California Exposition activities or the overhead wires.

Accessibility – During the period of the annual State Fair beginning September 1st the site will be virtually inaccessible other than from visitors who are also attending the Fair. During this period approximately 1 million visitors attend the Fair.

Expected Visitor Capture – The conditions outlined above regarding ambiance may compromise the ability of the site to achieve full visitor penetration potential.



Site Entrance From Behind Cal Expo



Bushy Lake

Sutter's Landing Park

The Gold Rush Park Foundation has proposed this site. The site is comprised of several parcels; some owned by the City of Sacramento and adjacent parcels held in private ownership. Total area is approximately 230 acres in size, is located on the south bank of the American River, above the flood plain, accessible from 28th Street.

Approximately 177 acres are owned by the City of Sacramento and are currently used as a city park, known as Sutter's Landing. The bulk of this site is unusable because it was previously used as a city dump. The dumpsite portion has been capped and methane gas venting equipment has been installed.

An additional 15 acres are located adjacent to this site that are owned by Susan Bell and used in the operation a recycling plant known as Bell Marine.

The Gold Rush Foundation also targets for acquisition, additional river front acreage located to the east of the Bell parcel, represented to be approximately 40 acres in size. No information has been provided regarding the features of these parcels or their current ownership.

Site Photos



Sutter's Landing Entrance & Methane Venting Facility

Summary of Findings and Recommendations

We have summarized the key site evaluation findings in the table presented below along with an element-by-element relative ranking of each site in terms of its comparative ability to support the CIHC concept.

The table lists the several elements of comparison described at the beginning of the Site Evaluation Section. Each of the elements has been evaluated in terms of apparent opportunities and strengths as well as observed and documented threats and weaknesses.

These findings are summarized in the matrix in order to assign a relative ranking to each site based on its comparative elements, taken separately and overall. To accomplish the ranking we have assigned a rating based on a scale of between -3 and +3 to each site, for each element of comparison. This approach recognizes that a site may have either a negative, neutral or positive element, which needs to be measured in its overall bundle attributes.

Market Value Planners

Table 13
California Indian Heritage Center
Summary of Site Strengths & Weaknesses
Relative Ranking Each Issue; Scale From -3 to +3

Comparison / Sites	Stone Lakes	Folsom	Northgate	Sutter's	Bushy
Site Features:					
Site Size	Adequate 160 Acres	Inadequate 27 Acres	Adequate 100- 200 Acres	232 Acres	337 Acres
Rank	+3	-3	+3	Not Ranked	Not Ranked
Flood & Soils	Below 100 Yr Plain Levee Adjustable, Special Flood Plain Const. Required	Above Flood Plain	Below 100 Yr Plain No Levee, Special Flood Plain Const. Required	Above Flood Plain	Below 100 Yr Plain Levee Fixed
Rank	+2	+3	+1	Not Ranked	Not Ranked
Adjacent Land Use	Agricultural Compatible	SRA Users Mixed Commercial, Urban	Adjacent City Park, Separate Use, BSA, Compatible	Light Industry	Cal Expo, 3 + Mil Annual Visitors, Limited Annual Use
Rank	+2	0	+2	Not Ranked	Not Ranked
Ambiance	Natural, Agriculture Interstate Hwy. 5, No Natural Water Access	Recreational Lake / Suburban, Limited Direct Water Access	Sense of Place, On River, Other Water Features Available or Possible	Threatening Brownfield / Industrial	Unknown Highly Developed
Rank	+2	0	+3	Not Ranked	Not Ranked
Infrastructure:					
Water, Sewer, Power	Water & Sewer 2.5 Miles North	Folsom Blvd., Adjacent	Hwy. 160, Adjacent	Unknown	Adjacent Cal Expo
Rank	-2	+3	+3	Not Ranked	Not Ranked
Transportation	Fair, I-5, River Rd.	Hwy 50, Light Rail,	Good Rt. 160- Ngate B.	Limited & RR Crossing	Good (Seasonal)

Table 13
California Indian Heritage Center
Summary of Site Strengths & Weaknesses
Relative Ranking Each Issue; Scale From -3 to +3

Comparison / Sites	Stone Lakes	Folsom	Northgate	Sutter's	Bushy
		Folsom Blvd. Access Requires Federal Funding Turn Out.			
Rank	+1	+1	+2	Not Ranked	Not Ranked
Planning Environment:	County, Zoned Agricultural, Workable	State Parks, BOR SAFCA, Folsom City – Workable	SAFCA, County, Sacramento City – Workable	Sacramento, City – Workable	SAFCA, County – Sensitive Unknown
Rank	+3	+3	+3	Not Ranked	Not Ranked
Land Assembly:	USFW Swap for State Equivalents, Private Parcels Unknown	State Dedication up to 27 Acres, Willow Creek Not Committed	SAFCA Transfer of Private Parcels, Prop 250 Funding, County Dedication	Private / Unknown Willingness	State Dedication
Rank	+2	+3	+2	Not Ranked	Not Ranked
Market Penetration:	12 miles south of Sacramento City Center 80% penetration	20 + miles east of Sacramento City Center No Outdoor Uses <50% penetration	Likely full penetration, close to Sacramento CBD & Visitor Activity Center	Limited	Limited & Seasonal
Rank	+1	-2	+3	Not Ranked	Not Ranked

Table 13
California Indian Heritage Center
Summary of Site Strengths & Weaknesses
Relative Ranking Each Issue; Scale From -3 to +3

Comparison / Sites	Stone Lakes	Folsom	Northgate	Sutter's	Bushy
Cumulative Ranking:					
Site Features	+9	0	+10		
Infrastructure	-1	+4	+5		
Planning	+3	+3	+3		
Land Assembly	+2	+3	+2		
Market Penetration	+1	-2	+3		
Total Ranking	+14	+8	+23	NR	NR

Source: Market Value Planners

The Bushy Lake and Sutter's Landing sites were removed from further consideration during a previous Task Force meeting and therefore have not been assigned individual or overall rankings.

Based on our analysis and ranking of each site's comparative elements, the Northgate site leads with a combined score of 23 points ahead of the Freeport-Stone Lakes site with 14 points and followed by the Natoma Bluff, Folsom site with 8 combined points.

Site Features

The Stone Lakes and Northgate site rank high on the basis of overall site features principally due to the availability of land, in excess of 100 acres and the ability to provide a sense of place, separate from the urban setting. The Natoma Bluff site's lack of adequate acreage absent the Willow Creek area places it at a distinct disadvantage in being able to support the full compliment of CIHC programs and activities.

Infrastructure

Natoma Bluff and Northgate rank high in terms of the accessibility of support infrastructure directly adjacent to the parcels, while Stone Lakes is disadvantaged by the 2.5 mile extension to reach sewer and water services.

Planning Environment

Each of the sites is subject to a very complex, multi-jurisdictional planning environment and has been rated equally in the overall scheme. This element of comparison did not reveal any particular reason why the project might not be approved at any given site but insufficient information is available at this point regarding its physical features, scope and impact.

Land Assembly

While Natoma Bluff was considered disadvantaged in terms of its amount of available land, it ranks highest in terms of potential to complete the land assembly DPR and BOR. Uncertainty regarding the ability to assemble some portions of the Northgate site diminished its ranking somewhat.

Market Penetration

Because of the Northgate site's proximity to the Sacramento CBD and other visitor attractions it is expected to achieve the highest level of market penetration, assuming sufficient land can be assembled to fully support the project concept. The Stone Lakes site, located 12 miles south of the Sacramento CBD could be a viable project as well but will remain at risk somewhat by its isolation from other visitor attractions and the concentration of visitor activity. Natoma Bluff receives a low ranking in visitor penetration in small part because of its distance from the metropolitan center but mostly

due to its small site size and inability to support the full range of indoor and outdoor elements of the concept.

Other Factors

The site evaluation methods and techniques applied in this report represent our effort to objectively and consistently measure the ability of candidate sites to support the CIHC concept, as presently articulated. The planning process is a feed-forward and feed-back endeavor.

Every effort has been made to accurately and fully measure the features of each site. In the course of the evaluation, many assumptions have been made based on site sponsor data and representations. The actual availability of selected parcels material to the successful implementation of a CIHC project cannot be determined until negotiations have advanced significantly. The overall planning environment within which entitlement will ultimately be secured is complex for each site, involving extensive public review and comment. Should any or several of the assumptions regarding availability of land parcels at any site, the potential for entitlement or the availability of support systems prove to have been incorrect, a site with a high ranking may be replaced by a previously considered lower ranking site.

Finally, other more community-based and overarching criteria could be appropriately applied in the site selection process that may compel the selection of a lower ranking site based on community support or other shared values.